

Petition for Termination of Guardianship

		THOMAS and MARCIA JARVIS , Paternal Grandparents and Guardians of the Estate, are Petitioners. Petitioners state termination of the guardianship of the estate is in the best interest of the minor because the minor has reached majority age. Former Minor Casey Tyler Halstead-Griffith filed Waiver of Account and Release of Guardian on 7-1-14. The Waiver states he is aware that the funds were formerly held at AG Edwards and Washington Mutual Funds, but were transferred to Wells Fargo Bank when those businesses ceased to exist. The only disbursements have been for Court ordered attorney fees to prepare accountings. The last accounting was approved on 10-4-10. The balance of the estate as of the last statement is \$132,541.01.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> POH at the close of the Fourth Account on 6-30-10 was \$82,869.14.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
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<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc Reviewed on: 8-4-14 Updates: 8-6-14 Recommendation: File 1 – Halstead-Griffith	

DOD: 02/28/14		VICTORIA REYES and STEPHANIE CALLAHAN,		NEEDS/PROBLEMS/COMMENTS:	
		daughters/Conservators, are		CONTINUED FROM 07/10/14	
		Petitioners.		1. The disbursements schedule shows numerous disbursements that appear excessive, so much so that it appears that the conservatee is paying for more than just her own expenses. The court may require more information regarding the following disbursements:	
Cont. from 071014		Account period: 10/01/13 – 03/31/14		<ul style="list-style-type: none"> • An average of \$730.84 per month for groceries • An average of \$369.71 per month for PG&E • An average of \$400.00 per month for Comcast 	
	Aff.Sub.Wit.			In addition to the above,	
✓	Verified			<ul style="list-style-type: none"> • An average of \$142.50 cash each month for recreation, entertainment and dining • An average of \$650/month was paid to Richelle or Victor Carter for meals, preparation, assistance, companionship 	
	Inventory			Note: California Rule of Court 7.1054(b)(1) states the conservator of the estate must provide competent management of the conservatee's property, with the care of a prudent person dealing with someone else's property and (b)(3) refrain from making loans or gifts of estate property except as authorized by the court after full disclosure.	
	PTC			2. The Petition does not address the disposition of conservatee's remaining property on hand, consisting of household furniture and furnishings.	
	Not.Cred.			3. The Petition does not address how payment of the requested attorney's fees is to be made. There does not appear to be cash in the estate. The Court may require further information.	
✓	Notice of Hrg				
✓	Aff.Mail	w/o			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	2620(c)				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				

Accounting - \$18,864.99
 Beginning POH- **\$2,333.27**
 Ending POH - **\$1,985.74** (no cash)
 Conservators - **waived**
 Attorney - **\$2,700.00** (per itemization for 10.8 hours @ \$250/hr.)
 Costs - **\$435.00** (filing fees)

Petitioners pray for an Order:

1. Approving, allowing and settling the attached account and report of Conservators as filed; and
2. Authorizing the attorney's fees and costs.

Reviewed by: JF

Reviewed on: 08/04/14

Updates:

Recommendation:

File 2 – Quintana

First and Final Report of Status of Administration on Waiver of Account and Petition for : (1) Compensation to Attorney for Ordinary Services; (2) Final Distribution; and (3) Reimbursement of Costs Advanced

DOD: 07/03/11		AIMEE HOLLAND , Successor Administrator, is Petitioner. Accounting is waived. I & A - \$119,714.51 POH - \$123,538.56 (\$126,938.56, see note 1) (\$123,538.56 cash plus a vehicle valued at \$3,400.00)	NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 06/12/14 Minute Order from 04/24/14 states: Issues discussed in open court. Mr. Winter will file another petition and will get the same date as this matter as long as it is filed in a timely manner. As of 08/07/14, nothing further has been filed. Note: An amended proposed Order has been submitted that proposes to distribute the property to Aimee Holland as Special Administrator of the Estate of Barbara Morgan, however, no amended Petition or Declaration/Supplement has been filed requesting such relief. The relief granted in an order signed by this court must be supported by filed documentation requesting such relief. 1. The property on hand appears to be miscalculated in the Petition and only includes the cash assets of the estate. The figure in the Petition excludes the vehicle valued at \$3,400. Examiner calculates that the total property on hand to be \$126,938.56. 2. The Petition states that the beneficiary of this estate is Barbara R. Morgan, who is now deceased, thus her estate is now the beneficiary. The Petition requests to pass the proceeds of this estate pursuant to the terms of Barbara's will; however, the proceeds of this estate cannot be passed pursuant to the will of its beneficiary. The assets of this estate can only pass to the Estate of Barbara Morgan as the intestate heir. From Barbara Morgan's estate, the proceeds can then be administered pursuant to her will. It is unclear from this Petition whether the Petitioner has been appointed as the personal representative of Barbara Morgan's estate.	
Cont. from 041014, 061214				
✓	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters	10/11/12		
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order	NEEDS/PROBLEMS/COMMENTS Con't: 3. The Petition states that Aimee Holland and Gail Stone as beneficiaries of the Morgan Family Trust have consented to "distribution in-kind" of the vehicle asset of this estate to the Trustee of the Morgan Family Trust. It is unclear what is meant by an "in-kind" distribution because it appears that Petitioner is requesting to distribute this asset to herself as successor trustee of the Morgan Family Trust, which is the same distribution she is requesting for all of the assets of the this estate. Need clarification. It is noted again, that this vehicle can only pass to the Estate of Barbara Morgan. It can then be distributed pursuant to the terms of her will from her estate. 4. Need Notice of Hearing. 5. Need proof of service at least 15 days before the hearing to the Personal Representative of the Estate of Barbara Morgan.		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			

4A Helen Murillo (CONS/PE)

Case No. 12CEPR00755

Atty Boyajian, Thomas M., sole practitioner (for Petitioner Irene V. Santos, Conservator)

Petition to Reduce Amount of Bond

Age: 88 years		IRENE V. SANTOS, daughter and Conservator of the Person and Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Page 4B</u> is Off Calendar. <u>Continued from 7/7/2014.</u> The following issue from the last hearing remains: 1. Need proposed order. <u>Note:</u> If <i>Petition</i> is granted, Court will set Status Hearing as follows: • Monday, September 8, 2014 at 9:00 a.m. in Dept. 303 for filing proof of reduced bond (<i>date coincides with hearing date of Petitioner's First Account Current; please refer to Page 4B.</i>)
Cont. from 070714			
	Aff.Sub.Wit.	Petitioner states: <ul style="list-style-type: none"> Petitioner filed a bond in the amount of \$123,895.20 on an estate that was valued at \$164,620.32 according to the <i>Final Inventory and Appraisal</i> filed on 3/7/2013; The estimated value of the estate was based on personal property valued at \$84,620.32, and real property valued at \$80,000.00; annual gross income from Conservatee from Social Security is \$11,112.00; The bond in the amount of \$123,895.20 based on the value of the estate as of 6/1/2014 is excessive; the estate has been reduced significantly because: (1) The Conservatee has needed homecare at the cost of \$2,000.00 per month for a year; (2) For the past year and a half the Conservatee has lived in an assisted living facility center with the average monthly cost of \$7,500.00; (3) There have been expenses of \$10,000.00 to pay off the encumbrance on the 1993 Fleetwood RV, and various other estate related expenses; If the current reduced value of the estate assets is used as the basis for the amount of bond, the bond required should be \$35,000.00, which is the pro-rata and reasonable sum based on the present value of the estate of around \$42,000.00, which is being extinguished rather excessively. <p>Petitioner prays for an order (1) Reducing the amount of bond required to \$35,000.00 or less; and (2) Allowing the [\$435.00] incurred filing fee for this petition to be charged to the estate.</p>	
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		X
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: LEG

Reviewed on: 8/5/14

Updates:

Recommendation:

File 4A - Murillo

Atty Boyajian, Thomas M., sole practitioner (for Conservator Irene V. Santos)

Status Hearing Re: Filing of the First Account

Age: 88 years	IRENE V. SANTOS , daughter, was appointed Conservator of the Person and Estate on 11/8/2012 with bond set at \$123,895.00 . <i>Order Appointing Probate Conservator</i> was filed 12/4/2012 .	NEEDS/PROBLEMS/COMMENTS:
Cont. from 121313, 010314, 040414, 071114		
Aff.Sub.Wit.	Minute Order dated 11/8/2012 from the hearing on the appointment of Conservator set this Status Hearing on 12/13/2013 for filing of the first account.	OFF CALENDAR
Verified		<i>First Account Current and Report of Conservator</i> was filed on 8/1/2014, and is set for hearing on 9/8/2014 .
Inventory	Final Inventory and Appraisal filed 3/7/2013 shows an estate value of \$164,620.32 consisting of cash (\$66,660.32) and real property.	Note: <i>Petition to Reduce Amount of Bond</i> was heard on 7/7/2014, and continued to 8/7/2014 .
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail	Proof of Bond was filed 5/6/2013 , and <i>Letters</i> issued on 5/23/2013 .	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Pursuant to Probate Code § 2620(a) , first account was due on 12/4/2013 .	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 8/5/14
		Updates:
		Recommendation:
		File 4B – Murillo

4B

Amended Petition for Appointment of Probate Conservator of the Person and Estate

Age: 69		TEMPORARY (PERSON) EXPIRES 8-7-14		NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 07/24/2014 Voting Rights Affected Need Minute Order. 1. Petition requests that bond be waived. Probate Code §2320 states except as otherwise provided by statute, every person appointed as conservator shall, before letters are issued, give a bond approved by the court. Probate Code §2321 states Notwithstanding any other provision of the law, the court in a conservatorship proceeding may not waive the filing of a bond or reduce the amount of bond required without a good cause determination by the court that the conservatee will not suffer harm as a result of the waiver or reduction of the bond. If the court requires bond it should be set at \$53,100.00. 2. Need Citation pursuant to Probate Code §1823. 3. Need proof of personal service of the citation and a copy of the petition on the proposed Conservatee pursuant to Probate Code §1824. Note: Order and Letters have been interlineated to reflect no medical consent power, dementia powers, placement in a nursing facility, or to administer dementia medication based on the petition not requesting these powers. <u>Please additional page for status hearings</u> Reviewed by: LV Reviewed on: 08/05/2014 Updates: Recommendation: File 5B – Waltrip
		TEMPORARY (ESTATE) EXPIRES 08/07/2014		
Cont. from		DEBBIE WALTRIP, Wife, is Petitioner and requests appointment as Conservator of the Person and the Estate without bond (\$2,625.00 to be deposited into a blocked account).		
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	x		
✓	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			

DEBBIE WALTRIP, Wife, is Petitioner and requests appointment as Conservator of the Person and the Estate without bond (\$2,625.00 to be deposited into a blocked account).

Estimated Value of Estate:

Personal property: \$ 2,625.00
 Annual income: \$ 45,648.00
 Cost of recovery: \$ 4,827.00
 Total: \$ 53,100.00

Voting Rights Affected

Petitioner states the proposed Conservatee was essentially kidnapped by his daughters and taken to Oklahoma and is now listed as a missing person under suspicious circumstances. He is currently without all his daily medications. The people that have taken him are the same people who took him four years ago and were able to coerce him into removing money from his accounts including \$33,000 from his annuity fund. Petitioner requests to be excused from giving notice to the proposed conservatee's daughters. Attached to the temp petition for conservatorship of the person are the Petitioner's marriage certificate indicating that she and the proposed Conservatee have been married since 1989, and also Progress Notes from VA hospital indicating that the proposed Conservatee is under VA care for dementia, other conditions. Declaration filed 5-27-14 provides additional details.

Larry Waltrip filed an Objection on 7-3-14. Mr. Waltrip states:

- He objects to the request that he be adjudged incapable of making informed decisions regarding his own health care.
- He objects to the request for orders related to dementia placement or treatment under Probate Code §2356.
- He denies that he is a resident of the State of California. He voluntarily left the State of California with his daughters with the intention of establishing his residence in Oklahoma. They came to California at his request to take him to Oklahoma.
- He denies that he is unable to effectively manage his own financial resources.
- He requests the conservatorship action be dismissed in its entirety.

Court Investigator Julie Negrete's report filed 07/30/2014.

Note: If the petition is granted status hearings will be set as follows:

- **Thursday, 09/11/2014 at 9:00a.m. in Dept. 303** for the filing of the Bond
- **Thursday, 01/15/2015 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Thursday, 10/08/2015 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Notice to Appear for Reconsideration of Fee Waiver

			NEEDS/PROBLEMS/COMMENTS: <u>CONFIDENTIAL HEARING</u>
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV
			Reviewed on: 08/05/2014
			Updates:
			Recommendation:
			File 5C – Waltrip

5B

**Petition for Determination of Validity of Trust Amendment; in the Alternative for
order Confirming Exercise of Power of Appointment**

		SUSAN FORD FRANTZICH , Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>A demurrer has been filed and set for hearing on 8-7-14 (Page B).</u> <u>Therefore, Examiner Notes are not provided at this time.</u>
Cont. from 071514			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 8-4-14	
		Updates:	
		Recommendation:	
		File 6A - Ford	

8A

Atty Keeler, William J.**Atty Chielpagian, Mark E.****Notice of Demurrer and Demurrer to Petition for Determination of Validity of Trust
Amendment, in the Order Confirming Exercise of Power of Appointment**

Age:		NEEDS/PROBLEMS/COMMENTS: Examiner Notes are not provided for this type of filing.	
DOD:			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Reviewed by: skc			
Reviewed on: 8-4-14			
Updates:			
Recommendation:			
File 6B – Ford			

		<p>Trustor THOMAS R. BUTLER and Beneficiaries CAROLE A. BUTLER, T. SCOTT BUTLER, GREGORY M. BUTLER, and STEPHEN P. BUTLER, are Petitioners.</p> <p>Petitioners state the Irrevocable Trust Agreement was created 4-1-86. Harlan L. Johnson was appointed as original trustee and John M. Shelton and David E. Harris were named first and second alternatives. In 1992 Mr. Johnson became gravely ill and was unable to continue to serve or designate a successor trustee. Mr. Shelton agreed to serve for the limited purpose of appointing a successor, and pursuant to the terms of the trust in effect at that time, Mr. Shelton appointed Mr. Harris and concurrently resigned as trustee.</p> <p>In 2010, the petitioners herein filed a petition in 10CEPR00554 to modify the trust to designate a successor trustee to Mr. Harris and grant the successor trustee the power and authority to designate a successor subject to the same conditions and qualifications set forth in the trust, and an order was entered on 8-11-10.</p> <p>Currently, Mr. Harris continues to serve as trustee; however, on 7-13-13, the designated successor trustee, Richard Strong, died. There is currently no successor trustee designated by the trust, and no mechanism for appointment of a successor except by Mr. Strong, who is now deceased. Accordingly, Petitioners seek to further modify the trust by naming a qualified successor.</p> <p>This petition does not seek modification of any of the provisions governing distribution, management, or other administration under the trust.</p> <p>Under Probate Code § 15404, if the trustor and all beneficiaries consent, they may compel the modification of an otherwise irrevocable trust. The trustor, trustee, all present beneficiaries, all and all adult contingent beneficiaries consent. Petitioners state the interests of the one minor contingent beneficiary and any unborn issue are identical to those of the present beneficiaries; therefore, they are adequately represented by the present beneficiaries and no guardian ad litem is needed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need clarification as to why this petition was filed in a new case rather than in the original case #10CEPR00554.</p> <p>The Court may wish to consolidate this case 14CEPR00524 with 10CEPR00554, (10CEPR00554 as lead).</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
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	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	Aff.Pub.		
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	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
SEE PAGE 2			

Reviewed by: skc

Reviewed on:
8-5-14

Updates:

Recommendation:

File 7 – Butler

Page 2

Petitioners request that Section 6.01 of Article VI of the Trust be modified and amended to designate **Thomas W. Isaac** as successor trustee in the place and stead of Richard Strong.

Petitioners pray for an order:

- 1) Dispensing with notice of hearing;
- 2) Determining that with respect to this petition, the interests of any unborn and unascertained beneficiaries are adequately represented without appointment of a guardian ad litem;
- 3) Approving the modification as set forth above; and
- 4) For additional orders the Court deems proper.

		<p>Trustor CAROLE A. BUTLER and Beneficiaries THOMAS R. BUTLER, T. SCOTT BUTLER, GREGORY M. BUTLER, and STEPHEN P. BUTLER, are Petitioners.</p> <p>Petitioners state the Irrevocable Trust Agreement was created 4-1-86. Harlan L. Johnson was appointed as original trustee and John M. Shelton and David E. Harris were named first and second alternatives. In 1992 Mr. Johnson became gravely ill and was unable to continue to serve or designate a successor trustee. Mr. Shelton agreed to serve for the limited purpose of appointing a successor, and pursuant to the terms of the trust in effect at that time, Mr. Shelton appointed Mr. Harris and concurrently resigned as trustee.</p> <p>In 2010, the petitioners herein filed a petition in 10CEPR00555 to modify the trust to designate a successor trustee to Mr. Harris and grant the successor trustee the power and authority to designate a successor subject to the same conditions and qualifications set forth in the trust, and an order was entered on 8-11-10.</p> <p>Currently, Mr. Harris continues to serve as trustee; however, on 7-13-13, the designated successor trustee, Richard Strong, died. There is currently no successor trustee designated by the trust, and no mechanism for appointment of a successor except by Mr. Strong, who is now deceased. Accordingly, Petitioners seek to further modify the trust by naming a qualified successor.</p> <p>This petition does not seek modification of any of the provisions governing distribution, management, or other administration under the trust.</p> <p>Under Probate Code § 15404, if the trustor and all beneficiaries consent, they may compel the modification of an otherwise irrevocable trust. The trustor, trustee, all present beneficiaries, all and all adult contingent beneficiaries consent. Petitioners state the interests of the one minor contingent beneficiary and any unborn issue are identical to those of the present beneficiaries; therefore, they are adequately represented by the present beneficiaries and no guardian ad litem is needed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need clarification as to why this petition was filed in a new case rather than in the original case #10CEPR00555.</p> <p>The Court may wish to consolidate this case 14CEPR00525 with 10CEPR00555, (10CEPR00555 as lead).</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
SEE PAGE 2			
			<p>Reviewed by: skc</p> <p>Reviewed on: 8-5-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 – Butler</p>

Page 2

Petitioners request that Section 6.01 of Article VI of the Trust be modified and amended to designate **Thomas W. Isaac** as successor trustee in the place and stead of Richard Strong.

Petitioners pray for an order:

- 1) Dispensing with notice of hearing;
- 2) Determining that with respect to this petition, the interests of any unborn and unascertained beneficiaries are adequately represented without appointment of a guardian ad litem;
- 3) Approving the modification as set forth above; and
- 4) For additional orders the Court deems proper.

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 01/18/14	SANDRA BROWN , named Executor without bond, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. The petition states that the decedent's original will was lost as it could not be located after his death. If the lost will is admitted to probate, a copy of the will must be attached to the Order for Probate pursuant to Probate Code § 8223. Need revised Order. 2. The Letters are not dated. Need Letters that are signed and dated. 3. The will is not self-proving, need Proof of Subscribing Witness. 4. The Petition is incomplete at item 5(a)(7) or (8) regarding issue of a predeceased child. 5. The Petition indicates that two beneficiaries of the will, Paulette Hayes and Ezola Ridley, are deceased. Pursuant to Local Rule 7.1.1D - If a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition. Note: If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Thursday, 01/08/15 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 10/08/15 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required. Note to Judge: Examiner has retained the Order and Letters.
Cont. from	Full IAEA – OK		
<input type="checkbox"/> Aff.Sub.Wit.	<input checked="" type="checkbox"/>	x	
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed on: 08/04/14
			Updates:
			Recommendation:
			File 9 – Robinson

Age: 4		GENERAL HEARING: 09/29/14		NEEDS/PROBLEMS/COMMENTS:	
		CATHLEEN WHARTON and DANNY WHARTON, JR. , paternal cousin and cousin in law, are Petitioners.		1. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Temporary Guardianship</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: a. Shawn Milton (father) b. Amanda Stivers (mother)	
		Father: SHAWN MILTON – served by mail on 07/29/14 (mail service is insufficient)			
Cont. from		Mother: AMANDA STIVERS			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg		Maternal grandfather: WENDELL MILTON Maternal grandmother: DOROTHY MILTON		
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.		Paternal grandfather: HERMAN DEMICK		
	Pers.Serv.	x	Paternal grandmother: SHARI STIVERS (PURKEY)		
✓	Conf. Screen				
✓	Letters		Petitioners state that Harmony has lived with them since she was 6 months old. Both parents have a long history of drug abuse and have had little contact with Petitioners or Harmony for most of her life.		
✓	Duties/Supp		Petitioners state that temporary guardianship is needed to enroll Harmony in school and to get her vaccinations.		
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 08/05/14	
				Updates:	
				Recommendation:	
				File 10 – Milton	

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File the First Account or Petition for Final Distribution**

DOD: 2/6/2004	MARTIN WAYDE CHANEY and RHONDA ANN CHANEY MALEWSKI were appointed co-administrators with full IAEA authority and without bond on 10/12/2004.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 020714		
Aff.Sub.Wit.	Letters issued on 10/12/2004.	<ol style="list-style-type: none"> Need inventory and appraisal, first account or petition for final distribution. Status report filed on 7/29/14 was signed by the attorney but not verified. Probate Code §1021 requires reports to be verified. Probate Code §§1023 states an attorney cannot sign or verify for a fiduciary. Status report filed on 7/29/14 states (at paragraph 3) that the decedent's will was admitted to probate on 10/12/2004. To date no will has been admitted to probate.
Verified		
Inventory	Inventory and appraisal was due March 2005.	
PTC		
Not.Cred.	First account or petition for final distribution was due October 2005.	
Notice of Hrg		
Aff.Mail	Creditor's Claims filed:	
Aff.Pub.	U.S. Bank - \$1,778.52.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Notice of Status Hearing was mailed to attorney David Gromis and Administrators Martin Wayde Chaney and Rhonda Malewski on 11/20/14.	
Letters		
Duties/Supp		
Objections		
Video Receipt	Status Report of Martin Wade Chaney filed on 7/29/14 states the estate is not yet in a condition to close because 1) an inventory and appraisal has not been completed and filed; 2) there is an issue as to whether a document purported to be the last will of the decedent is intended to be submitted for probate; 3) a determination of what tax returns for the estate have been or need to be filed; and 4) an account to date has not been prepared.	
CI Report		File 11 – Chaney
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	It is estimated that an additional 3 – 6 months may be necessary to close this estate.	

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 7/27/2005		<p>JEFFREY MCCLAY was appointed as Administrator with full IAEA authority and with bond set at \$252,100.00 on 5/23/2006.</p> <p>Bond of \$252,100.00 was filed on 8/31/2006.</p> <p>Letters issued on 8/31/2006.</p> <p>Inventory and appraisal filed on 2/5/2007 showing the estate valued at \$300,000.00</p> <p>Creditor's Claims filed:</p> <ul style="list-style-type: none">• Cancer Care Associates - \$1,105.65 <p>Notice of Status Hearing was mailed to attorney Thomas Alexander and Administrator Jeffrey McClay on 11/22/14.</p> <p>Note: The mailing to Jeffrey McClay was returned as undeliverable.</p> <p>Minute Order dated 3/7/14 states no appearances. The court directs that a copy of the minute order be sent to Thomas Alexander. The Court sets the matter for an Order to Show Cause regarding contempt, failure to appear and failure to respond to the Court's request. Thomas Alexander is ordered to be personally present on 5/2/14.</p> <p>Minute order re Order to Show Cause indicates there were no appearances. The Court imposed sanctions in the amount of \$500.00 against Thomas Alexander. Payment to be made no later than 5/23/14. Copy of the minute order was mailed to Attorney Alexander on 5/6/14. – Vacated by minute order dated 6/5/14.</p>	NEEDS/PROBLEMS/COMMENTS: Continued from 6/5/14. <ol style="list-style-type: none">1. Need petition for final distribution <u>or</u> current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from 030714, 050214, 060514			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: KT			
Reviewed on: 8/4/14			
Updates:			
Recommendation:			
File 12 – McClay			

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

		<p>JEFFREY HALL and RONALD HALL, sons, were appointed Co-Administrators of the Estate without bond and with full IAEA on 10/12/12. Letters were issued on 10/12/12.</p> <p>Inventory & Appraisal, partial no. 1 filed 04/02/13- \$190,000.00</p> <p>Inventory & Appraisal, partial no. 2 filed 04/02/13- \$225,000.00</p> <p>Inventory & Appraisal, partial no. 3 filed 04/02/13- \$6,000.00</p> <p>Inventory & Appraisal, partial no. 4 filed 05/22/13- \$235,881.02</p> <p>Inventory & Appraisal, final filed 05/22/13 - \$309,473.23</p> <p>Status Report filed 07/28/14 states: all inventories and appraisals have been filed. The Co-Administrators have been delayed in working on final insurance claims that might impact estate assets and are therefore not in a position to close the estate and request a 6 month continuance.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 06/05/14</u></p> <p>1. Need Account/Report of Administrators and Petition for Final Distribution.</p>
Cont. from 060514			
Aff.Sub.Wit.			
Verified	x		
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w/		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 08/04/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Hall</p>	

Samantha, 7	<p align="center">TEMPORARY EXPIRES 8/7/14</p> <p>MATILDE LOPEZ, half-sister, is Petitioner.</p> <p>Father: JUAN PEREZ</p> <p>Mother: ROSA MARIA HERNANDEZ CISNEROS - Deceased</p> <p>Petitioner, Matilde Lopez, filed a petition to be appointed guardian of her siblings. In her petition she alleged physical and mental abuse by the father. I</p> <p>Court Investigator Dina Calvillo'S Report filed 1/30/14</p> <p>Minute order dated 2/6/14 set this matter for a contested hearing. Visitation was to be determined between the parties with the exception that the father have a minimum of one visit per week with the children.</p> <p>Minute order dated 6/26/14 (Court Trial) set this matter for status hearing.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Kevin, 3		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: KT</p> <p>Reviewed on: 8/5/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 – Perez & Hernandez</p>	

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 01/09/13	JACKI DRIVER , girlfriend, was appointed Executor with full IAEA and without bond on 12/05/13. Letters Testamentary were issued on 12/05/13.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 06/05/14</u> 1. Need Inventory & Appraisal.
Cont. from 050214, 060514		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 08/04/14		
Updates:		
Recommendation:		
File 15 – Rusconi		

Atty Pape, Jeffrey B., of Pape & Shewan (for Raheleh Gohari, Trustee)

Status Hearing Re: Filing of the Bond or Proof of Deposit into a Blocked Account

Age: 56 years		<p>RAHELEH GOHARI, daughter and Agent for the Proposed Beneficiary, filed a <i>Petition by Agent Under Power of Attorney for Order to Establish Special Needs Trust</i> on 1/7/2014.</p> <p>Minute Order dated 3/24/2014 from the hearing on the petition states the Court acknowledges that a house and a car will be purchased. The Court approves the petition subject to counsel obtaining either a bond or blocked account for the remaining balance. The issue regarding any withdrawals is reserved.</p> <p>Order Authorizing Establishment of Special Needs Trust filed 4/8/2014 finds that proceeds of \$163,271.43 shall be paid to the Trustee of the Special Needs Trust, and the Trustee shall thereafter deposit the funds in a blocked account within 15 days of receipt of such funds.</p> <p>Status Report filed 7/31/2014 states:</p> <ul style="list-style-type: none"> The Farshad Gohari Special Needs Trust created pursuant to Order dated 4/8/2014 is established for the specific purpose of receipt, management and disbursement of workers compensation proceeds awarded for the benefit of Farshad Gohari; The Order Approving Compromise and Release was signed by the Workers' Compensation Judge on 5/6/2014 in the matter of [Workers' compensation case name] Claim Number [omitted]; The settlement funds are required to be paid within 30 days of [the 5/6/2014] Order; On 7/30/2014, declarant [Attorney Pape] received the settlement funds; Declarant has made application with a bonding company to seek a bond in the amount of \$20,000.00 and anticipates filing within the next 7 days an application with the Court to set a bond at \$20,000.00 and to block all but \$20,000.00 of the funds to ease administration of the Special Needs Trust. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 6/5/2014.</u></p>	
Cont. from 060514				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input checked="" type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 8/6/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – Gohari</p>		

DOD: 3-7-13	On 5-7-14, TARIQ ABBASI was appointed as Special Trustee of the David Robertson Revocable Living Trust, as related to the Shaver Lake Property, and was also appointed as Trustee of the Mattox Trust, created under the David Robertson Revocable Living Trust.	NEEDS/PROBLEMS/COMMENTS:
		<u>OFF CALENDAR</u>
		Bond filed 7-1-14.
Cont. from 061214		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	The order requires that Mr. Abbasi obtain a bond in the amount of \$250,000.00.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	The Court set this status hearing for the filing of the bond.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8-4-14
		Updates:
		Recommendation:
		File 17 - Robertson

18 Haylie Vuori, Trystyn Vuori, and McKayla Vuori (GUARD/P)

Case No. 08CEPR00522

Atty Fields, Keith (pro per Guardian/maternal grandfather)
 Atty Fields, Valerie (pro per Guardian/maternal grandmother)
 Atty Vuori, Tiffany (pro per Petitioner/mother)

Petition for Visitation

Haylie age 16	TIFFANY VUORI, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Trystyn age 14		
McKayla age 14		Petition to terminate the guardianship and appoint a successor guardian, as to Haylie only, is set for hearing on 9/23/14.
Cont. from		1. Need Notice of Hearing.
Aff.Sub.Wit.		
✓ Verified	Father: ADAM VUORI	2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on: a. Keith Fields (Guardian) b. Valerie Fields (Guardian) c. Haylie Vuori (Minor age 16) d. Trystyn Vuori (Minor age 14) e. McKayla Vuori (Minor age 14)
Inventory		
PTC	Petitioner states the restraining order expires on 7/2/14 and she would like visitation to resume. Petitioner states she is willing to negotiate with the guardians based upon the children's school and sports schedules.	Note: A Restraining Order dated 8/2/11 in 11CEFL04342 (Valerie Fields v. Tiffany Vuori) protects the guardians and the children from the mother, Tiffany Vuori (expired 8/2/14). Notice of Hearing to Renew Restraining Order was filed on 8/1/14 and is set for hearing 8/21/14 at 8:30 a.m. Dept. 304
Not.Cred.		
Notice of Hrg	X	
Aff.Mail	X	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	X	
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 8/5/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 18 – Vuori

Miguel, 7		<p align="center"><u>TEMPORARY EXPIRES 08/07/14</u></p> <p>ANDREA CORTES and RICHARD CORTES, maternal aunt and uncle, are Petitioners.</p> <p>Father: NOT LISTED – Declaration of Due Diligence filed 06/02/14</p> <p>Mother: MAYRA LOPEZ – Declaration of Due Diligence filed 06/02/14; Mother attended temp. hearing on 06/16/14 and stated she was in favor of the guardianship</p> <p>Paternal grandparents: NOT LISTED</p> <p>Maternal grandparents: NOT LISTED</p> <p>Petitioners' state: they do not know the father's name. The only knowledge they have is that he was deported and jailed in Mexico. Mother is on the streets and cannot be found.</p> <p>Court Investigator Jennifer Daniel filed a report on 07/31/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Guardianship <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Father – personal service required, unless diligence is found. Declaration of Due Diligence filed 06/02/14. b. Mayra Lopez - personal service required, unless diligence is found. Declaration of Due Diligence filed 06/02/14. c. Paternal grandparents – service by mail sufficient d. Maternal grandparents – service by mail sufficient 3. Need Duties of Guardian [form GC-248) signed by each Petitioner. Note: Letters of Guardianship cannot be issued without this document being signed and filed. 	
Jessie, 5				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
	Duties/Supp			x
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 08/05/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 – Aguayo-Lopez</p>		

20 Navdeep Singh (CONS/P)
Atty Dhindsa, Tarandeep Singh (pro per – brother/Petitioner)
Atty Kaur, Amaneet (pro per – sister-in-law/Petitioner)

Case No. 14CEPR00567

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 23		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		TARANDEEP DHINDSA and AMANEET KAUR , brother & sister-in-law, are		Court Investigator advised rights on 07/14/14.	
		Petitioners and request appointment as			
		Conservators of the Person with			
Cont. from		Medical Consent powers.		Voting rights affected, need minute order.	
	Aff.Sub.Wit.				
✓	Verified		Declaration of Tarlochan S. Tagore, M.D. supports request for medical consent powers.	1. The Paternal grandparents are not listed in item 11 of the Petition and do not appear to have been provided notice. All relatives within the second degree should be listed in item 11 and provided notice by mail. If the paternal grandparents are deceased, their names and date of death should be listed in item 11. (Local Rule 7.1.1D).	
	Inventory				
	PTC				
	Not.Cred.		Voting rights affected.		
✓	Notice of Hrg		Petitioners' state: that Navdeep suffers from Autism and does not have the necessary skills to live independently or manage his own financial matters.		
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
✓	Pers.Serv.	w/	Court Investigator Charlotte Bien filed a report on 07/16/14.		
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
✓	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
✓	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 08/05/14	
				Updates:	
				Recommendation:	
				File 20 – Singh	

Age: 18		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		MARIA EUGENIA NARANJO DE AMBRIZ , mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.		Court Investigator advised rights on 07/21/14.	
		Declaration of Derys Arrieta-Zorro, M.D. does not support request for medical consent powers.		Voting rights affected, need minute order.	
Cont. from		Voting rights affected.		1. No grandparents are listed in item 11 of the Petition and no proof of service has been filed indicating that they have been provided notice. All relatives within the second degree should be listed in item 11 and provided notice by mail. If the grandparents are deceased, their names and date of death should be listed in item 11. (Local Rule 7.1.1D).	
<input type="checkbox"/>	Aff.Sub.Wit.				
<input checked="" type="checkbox"/>	Verified				
<input type="checkbox"/>	Inventory				
<input type="checkbox"/>	PTC				
<input type="checkbox"/>	Not.Cred.				
<input checked="" type="checkbox"/>	Notice of Hrg				
<input checked="" type="checkbox"/>	Aff.Mail	w/			
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.				
<input checked="" type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters				
<input checked="" type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input checked="" type="checkbox"/>	Video Receipt				
<input checked="" type="checkbox"/>	CI Report				
<input type="checkbox"/>	9202				
<input checked="" type="checkbox"/>	Order				
<input type="checkbox"/>	Aff. Posting				
<input type="checkbox"/>	Status Rpt				
<input type="checkbox"/>	UCCJEA				
<input checked="" type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 08/05/14	
				Updates:	
				Recommendation:	
				File 21 – Ambriz	

Atty Santiesteban, Lilia (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Lilia, 5	GENERAL HEARING: 10/01/14		NEEDS/PROBLEMS/COMMENTS:										
Micah, 2	<p>LILIA SANTIESTEBAN, maternal grandmother, is Petitioner.</p> <p>Father (Lilia): CARLOS CAPUCHIN Father (Micah & Makenzie): MICHAEL WYATT</p> <p>Mother: LIZBETTE DE JESUS VALENZUELA</p> <p>Paternal grandparents (Lilia): FREDDY CAPUCHIN & ROSEMARY CAPUCHIN</p> <p>Paternal grandparents (Micah & Makenzie): ERNIE WYATT & SHARON WYATT</p> <p>Maternal grandfather: ENRIQUE VALENZUELA</p> <p>Petitioner states that temporary guardianship is necessary to keep CPS from taking further action. The children need a guardian to ensure their safety. The parents are not able to provide a safe home.</p>												
McKenzie, 1			<p>1. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Temporary Guardianship Petition</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <p>a. Carlos Capuchin (Lilia's father)</p> <p>b. Michael Wyatt (Micah & Makenzie's father)</p> <p>c. Lizbette De Jesus Valenzuela (mother)</p>										
Cont. from													
<input type="checkbox"/> Aff.Sub.Wit.			<table border="1"> <tr><td colspan="2">Reviewed by: JF</td></tr> <tr><td colspan="2">Reviewed on: 08/05/14</td></tr> <tr><td colspan="2">Updates:</td></tr> <tr><td colspan="2">Recommendation:</td></tr> <tr><td colspan="2">File 22 – Capuchin & Wyatt</td></tr> </table>	Reviewed by: JF		Reviewed on: 08/05/14		Updates:		Recommendation:		File 22 – Capuchin & Wyatt	
Reviewed by: JF													
Reviewed on: 08/05/14													
Updates:													
Recommendation:													
File 22 – Capuchin & Wyatt													
<input checked="" type="checkbox"/> Verified													
<input type="checkbox"/> Inventory													
<input type="checkbox"/> PTC													
<input type="checkbox"/> Not.Cred.													
<input checked="" type="checkbox"/> Notice of Hrg													
<input type="checkbox"/> Aff.Mail													
<input type="checkbox"/> Aff.Pub.													
<input type="checkbox"/> Sp.Ntc.													
<input type="checkbox"/> Pers.Serv.	x												
<input checked="" type="checkbox"/> Conf. Screen													
<input checked="" type="checkbox"/> Letters													
<input checked="" type="checkbox"/> Duties/Supp													
<input type="checkbox"/> Objections													
<input type="checkbox"/> Video Receipt													
<input type="checkbox"/> CI Report													
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<input checked="" type="checkbox"/> Order													
<input type="checkbox"/> Aff. Posting													
<input type="checkbox"/> Status Rpt													
<input checked="" type="checkbox"/> UCCJEA													
<input type="checkbox"/> Citation													
<input type="checkbox"/> FTB Notice													